

**Work Opportunity & Welfare-to-Work Tax Credits  
NATIONAL TRAINING CONFERENCE  
Orlando, FL  
October 28 - 31, 2002**

**DRAFT AGENDA**

*(Coffee & Refreshments will be served everyday)*

**Day 1: Monday, October 28, 2002**

9:30 – 12:00 pm    ***Registration***

10:00 – 12:00    ***Pre-Conference Session: ETA Form 9058, Report No. 2***

John Carlson, Texas Workforce Commission

Hy Dubowsky, New York State Department of Labor

Brent Garvin, South Carolina Employment Security Commission

Roger Littlejohn, Tennessee Dept. of Labor & Workforce Development

Christy Robbins, Montana Department of Labor and Industry

12:00 – 1:00    LUNCH ON YOUR OWN

1:00 – 1:30    ***Registration***

1:30 – 2:00    ***Welcome Remarks***

Gay Gilbert, Division Chief, USES & ALMI S

2:00 – 2:15    ***Agenda Review & Housekeeping***

Carol Wargo, Center for Workforce Learning

2:15 – 2:45    ***Briefing on the 2001, "Summer Work Group Meetings"  
& "Overview of the 3<sup>rd</sup>. Ed., of ETA Handbook 408"***

Carmen Ortiz, National Coordinator

2:45 – 3:15    ***IRS Legislative Update***

Karin Loverud, Counsel

3:15 – 3:30    BREAK

3:30 – 5:00    ***"Expanding Business Involvement & Connections to Economic Development"***

Employer Panel

5:15 – 6:00      ***AWARDS CEREMONY – “Secretary’s Exceptional Achievement Award”***  
 Gay Gilbert, Division Chief USES & ALMI S  
 Anthony Dais, Team Leader USES & ALMI S  
 Carmen Ortiz, National Coordinator

***Day 2: Tuesday, October 29, 2002***

8:30 – 8:45 am      ***Convene & Review Day’s Agenda***

8:45 – 9:45      ***Chapters 1 – “Background & Legislative History” & 2 – “Program Provisions”***  
 Sept 2002, 3<sup>rd</sup>, Ed., ETA Handbook 408  
 Brent Garvin, South Carolina Employment Security Commission  
 Gay Johnson, U.S. Department of Labor Region VI Coordinator

9:45 – 10:25      ***Chapter 3 – “Qualified Wages & Special Rules”***  
 Sept 2002, 3<sup>rd</sup>, Ed., ETA Handbook 408  
 Hy Dubowsky, New York State Department of Labor

10:25 – 10:40      BREAK

10:40 – 11:00      ***TA & Review Guide***  
 Federal Oversight Visits  
 Robin Foote, U.S. Department of Labor Region IV Coordinator

11:00 – 12:00 pm      ***Chapters 4 – “The Welfare-to-Work Tax Credit” & 5 – “WtWTC Provisions”***  
 Sept. 2002, 3<sup>rd</sup>, Ed., ETA Handbook 408  
 Sara Davidson, Missouri Department of Economic Development  
 Christy Robbins, Montana Department of Labor and Industry

12:00 – 1:00      LUNCH ON YOUR OWN

1:00 – 1:45      ***Chapter 6 – “Roles & Responsibilities”***  
 Sept. 2002, 3<sup>rd</sup>, Ed., ETA Handbook 408  
 Madhavi Bhadbhade, Nebraska Workforce Development  
 Rosa Crowley, U.S. Department of Labor Region III Coordinator

1:45 – 2:15      ***Integrating the One-Stops with the Tax Credits***  
 Mary Ann Lawrence, Center for Workforce Learning

- 2:15 – 3:30      ***Chapter 7 – “Certification Process,” (Case Study & Application Exercises)***  
 Sept. 2002, 3<sup>rd</sup>, Ed., ETA Handbook 408  
 John Carlson, Texas Workforce Commission  
 Madhavi Bhadbhade, Nebraska Workforce Development  
 Sara Davidson, Missouri Department of Economic Development  
 Gay Johnson, U.S. Department of Labor Region VI Coordinator  
 Christy Robbins, Montana Department of Labor and Industry
- 3:30 – 3:45      BREAK
- 3:45 – 5:15      ***Chapter 8 – “Administration & Reporting Requirements” (Application Exercise)***  
 Sept. 2002, 3<sup>rd</sup>, Ed., ETA Handbook 408  
 Special Session – New ETA Form 9058, Report #: 2  
 John Carlson, Texas Workforce Commission  
 Hy Dubowsky, New York State Department of Labor  
 Brent Garvin, South Carolina Employment Security Commission  
 Roger Littlejohn, Tennessee Dept. of Labor & Workforce Development  
 Christy Robbins, Montana Department of Labor and Industry
- 5:15 – 5:30      ***Review Day 2 & ADJOURN***

### ***Day 3: Wednesday, October 30, 2002***

- 8:30 – 8:45 am      ***Convene & Review Day’s Agenda***
- 8:45 – 10:00      ***NEW “EIMS Tax Credit Reporting System”***  
 Contractor, Facilitator
- 10:00 – 11:00      ***Simplified Tax & Wage Reporting System, (STAWRS) Briefing, IRS***  
 “Electronic Filing Demo - IRS Form 8850”
- 11:00 – 11:15      BREAK
- 11:15 – 12:30 pm      ***O\*NET Presentation – “Transition From DOT Codes”***  
 Trainer, Facilitator
- 12:30 – 1:30      LUNCH ON YOUR OWN
- 1:30 – 2:30      ***HUD’S Renewal Communities***  
 Federal/State Partners, Facilitator  
 (Qs & As)

- 2:30 – 3:45      ***States' "SHOW & TELL"***  
State Coordinators, Facilitator
- 3:45 – 4:00      BREAK
- 4:00 – 5:30      ***ROUNDTABLE DISCUSSION***  
Outstanding Issues  
*ES, IRS, SOL, HHS, HUD, USDA Panel*  
(For participation by Federal and State representatives only)
- 5:30                ***ADJOURN***

***DAY 4: Thursday, October 31, 2002***

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- 8:30 – 8:45 am    ***Convene & Discuss Final Day's Agenda***
- 8:45 – 10:15      ***ROUNDTABLE DISCUSSION***  
Summary and Review of Wednesday Roundtable's Issues  
*ES, IRS, SOL, HHS, HUD, USDA Panel*  
(Participation by all)
- 10:15 – 10:30    BREAK
- 10:30 – 11:45    ***Promotional & Outreach Materials***  
National, Regional Efforts  
Madhavi Bhadbhade, Nebraska Workforce Development  
Rosa Crowley, U.S. Department of Labor Region III Coordinator  
Kenita Johnson, Center for Workforce Learning
- 11:45 – 12:00    ***RECAPPING & CONFERENCE CLOSURE***



**HAPPY HALLOWEEN!**

